STATEWIDE PERSONNEL SYSTEM

Terminate an Employee (for HR Coordinators)

May 2016

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Terminate Employee Business Process

Process Overview

The process steps in the Termination business process are listed in the table below.

#	Process Steps	Role	Description
1	**Initiate Termination**	HR Coordinator	Specify employee, termination reason, date of termination, etc.
2	**Agency Approvals**	Appointing Authority Partner	Agency approval of termination request
		Budget and Finance Partner	Agency budget approval for termination request.
3	**To Dos: Security**	HR Coordinator HR Partner	Review the security role of the position and outside of Workday, fill out the Application & Authority for OPSB System Access (if applicable).
		Security Administrator	Remove user-based security groups (if applicable)
		HR Coordinator	Assign roles to another worker
4	**To Dos: Manage Business Processes Assigned for a Worker**	HR Coordinator	Route assigned tasks to another worker.
5	**Update Retiree Status**	Retiree Partner	Add/Update retiree status (if applicable)
6	**To Dos: Payroll**	Payroll Partner	Request severance payout and/or final leave payout (if applicable)
			Process final paycheck
7	**Terminate User Account**	Workday System	Terminate user Workday account

NOTE: Routing is based on the reason selected when initiating the business process.

Events and Reasons

The table below includes valid voluntary and involuntary reasons that a manager can terminate an employee.

You must always select a primary reason. Secondary reasons are generally entered for informational purposes. However, disciplinary termination reasons (in bold) require a secondary reason. When you select one of these primary reasons, you must also select the “Unsatisfactory Report of Service” secondary reason. Primary and secondary reasons are listed in the Table 1 and Table 2 below.

Table 1 – Termination Primary Reasons

Event	Reason
Termination (Primary Reasons - Voluntary)	Resignation in Lieu of Termination *****
	Resignation Without Proper Notice *****
	Resigned for Military Service *****
	Resigned State Service *****
	Transfer to a non-SPMS Agency *****
	Retired
Termination (Primary Reasons - Involuntary)	**Terminated ***
	Terminated on Probation *
	Terminated with Prejudice *
	Contract Expired *****
	Deceased *****
	End of Temporary Employment *****
	New Hire – No Show *****
	New Hire – Declined Offer After Acceptance *****
	Leave Without Pay (Medical, Military, Personal) *****
	Laid Off From Allocated Position
	Position Abolished

NOTE: An asterisk (*) indicates a reason for which a manager can initiate a termination.

Table 2 – Termination Secondary Reasons

Event	Reason
Termination (Secondary Reasons)	Accepted Another Job
	Best Interest of the State
	Continuing Education
	Insufficient Salary
	Job Affiliated with a Union
	Job Location
	Job Not Affiliated with a Union
	Lack of Career Path with Job
	Lack of Parking at Job Location
	Lack of Tuition Assistance
	Military Obligation
	Personal Reasons
	Relocating Outside of Area
	Unable or Unwilling to Perform All Job Duties
	Unsatisfactory Report of Service

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Before you begin…

You will need the following information to complete the Termination business process.

- Terminated Employee Name or Employee ID Number
- Termination Date
- Reason for Termination
- Last Day or Work
- Pay Through Date

Procedure: Terminate Employee

Use this procedure to enter and submit an employee termination in Workday.

IMPORTANT:

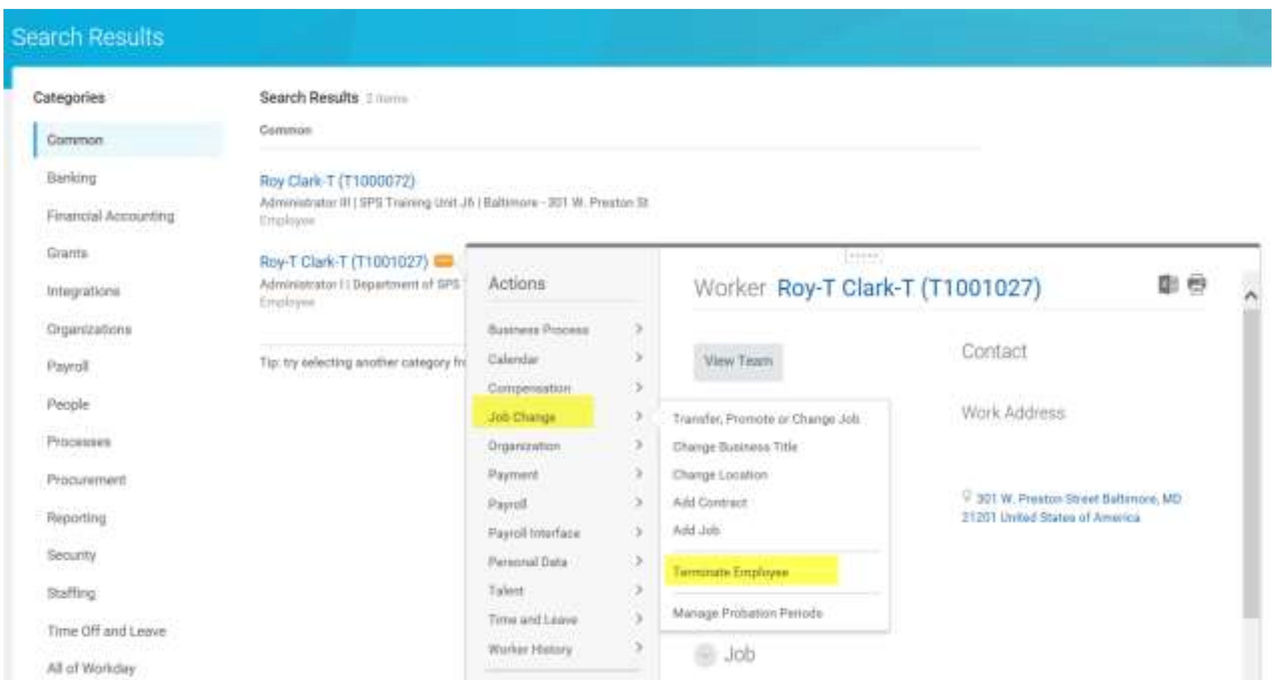
- All employee timesheets should be submitted and approved prior to the termination date. Timesheets should include any time off taken.
- If there is going to be a position overlap:
  - The termination must be processed in advance of the termination date.
  - The overlap hire (employee assuming the positon) must be processed in advance of the termination date.
- The effective date of contractual employee terminations should be the last day of work

Procedure:

1. Search for the employee.

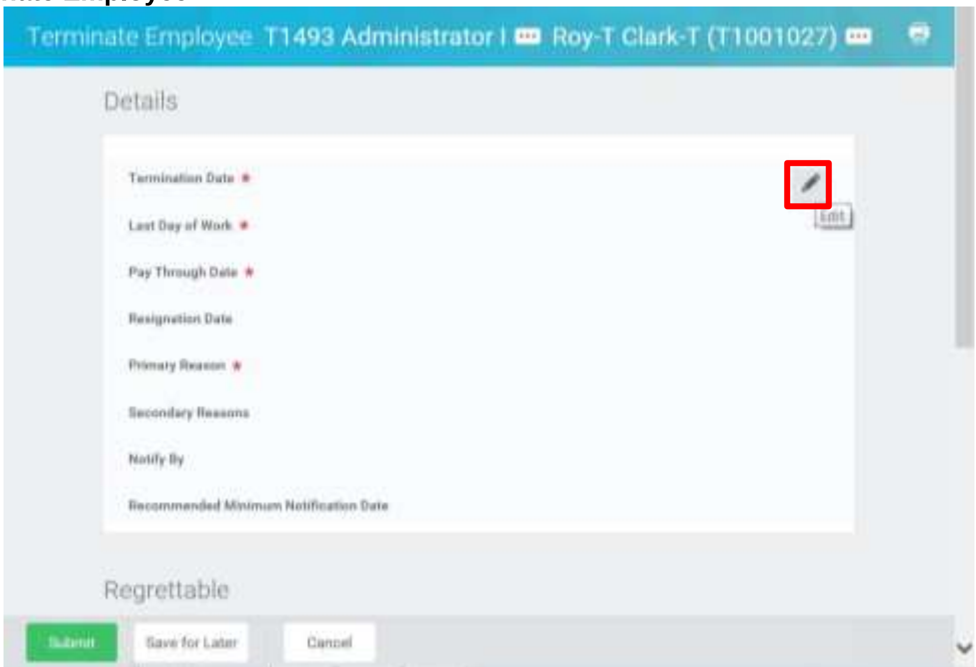
   Tip: To find an employee…
   - Type the employee name or employee ID in the **Search** field. Then, click the **Search** icon, OR
   - Find the employee in their assigned Supervisory Organization on the **Members** tab.

2. Click the Related Actions and Preview icon next to the employee's name.



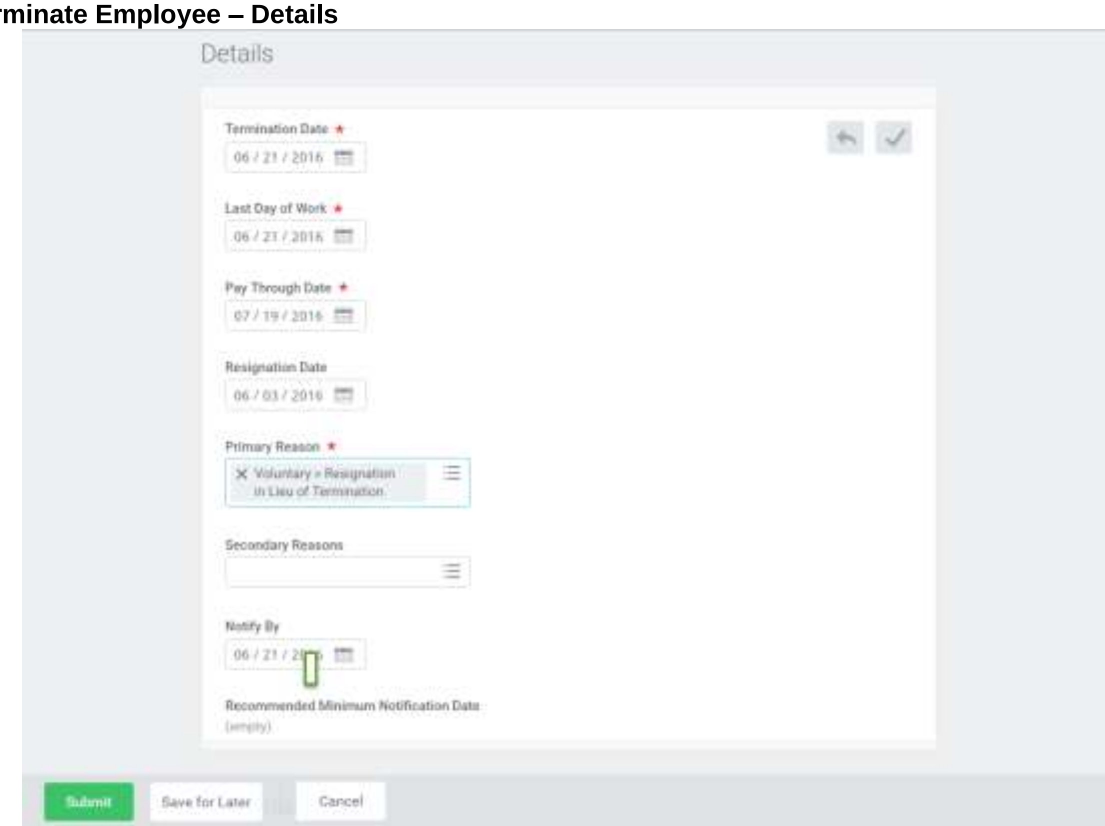
3. In the menu, hover over Job Change and then Terminate Employee.

Terminate Employee



4. In the **Details** section, click the **Edit**  icon to complete the fields.

Terminate Employee – Details



5. Enter the dates on the Terminate Employee page based on the criteria below. **Note:** Refer to the **Workday Termination Reference** table on page 9 for examples

#	Date Field	Description
1	**Termination Date**	• **Mandatory Field.** • This is the effective date of the termination event. • This field is mandatory and should reflect the employee's last day in the position, which would include work time and the use of paid leave. • The termination is assumed to take effect at the end of the workday. • The Termination Date for an employee retiring directly from employment should reflect the last day of the month, and the retirement date would reflect the first day of the following month.
2	**Last Day of Work**	• **Mandatory Field.** • This date should be the same as the Termination Date. • This date will auto populate after the Termination Date is entered and should not be changed. • The last day of work may include the last physical day at work or the last day on paid leave as an active employee, whichever is later.
3	**Pay Through Date**	• **Mandatory Field.** Allows employee to be remain on payroll CPB. • This date is used to remove the employee from Payroll; Reflects the date the employee will be removed from the State's payroll. • Allows the processing of pay/time card corrections prior to the final payments. • Must be <u>two full pay periods</u> after the Termination Date; should always be the pay period end date of the pay period. • Will not prevent the agency from recruiting activities for the vacant position. **Note:** Workday will calculate what is owed the employee for accrued/earned leave based on COMAR. This will be automatically paid out to the employee on the first pay date following the Pay Through Date.
4	**Resignation Date**	• **Optional Field.** The Resignation Date applies to <u>voluntary terminations only</u>. • This is the date the employee submitted their notice of resignation. • This information may be useful in situations that involve employee relations activities.

Workday Termination Date Reference				
Dates (System date fields in **bold**)	**Scenario** **Employee Resigned**: 6/3/2016 **Last day in the office:** 06/21/16 **Leave:** No leave taken	**Scenario** **Employee Resigned**: 5/27/2016 **Last day in the office:** 06/10/2016 **Leave:** 6/13/16 – 6/21/16	**Scenario** **Retirement Submitted**: 6/3/2016 **Retirement Date:** 7/1/2016 **Last day in the office:** 06/30/2016 **Leave:** No leave taken	**Scenario** **Retirement Submitted**: 6/3/2016 **Retirement Date:** 7/1/2016 **Last day in the office:** 06/10/16 **Leave:** 6/13/16 – 6/30/16
Resignation Date	June 3, 2016	May 27, 2016	June 3, 2016	June 3, 2016
Timesheets approved by	June 21, 2016	June 21, 2016	June 30, 2016	June 30, 2016
Termination Date	June 21, 2016	June 21, 2016	June 30, 2016	June 30, 2016
Last Day of Work	June 21, 2016	June 21, 2016	June 30, 2016	June 30, 2016
Pay Through Date	July 19, 2016	July 19, 2016	August 2, 2016	August 2, 2016
Final Payout Pay Date	July 27, 2016	July 27, 2016	August 10, 2016	August 10, 2016
Retirement Date	N/A	N/A	July 1, 2016	July 1, 2016

6. In the **Primary Reason** field, use the prompt to select the reason for termination.

Information: If the primary reason selected is a disciplinary termination, then Unsatisfactory Report of Service must be chosen as a secondary reason. The combination of these reasons will trigger a 106 or 106P and put the person in the POC database so that all agencies can access the information.

7. A secondary reason is required if the primary reason selected is for a disciplinary termination. If applicable, use the prompt to select a secondary reason for termination in the **Secondary Reason** field.

Terminate Employee Page – Position Details

8. Click the **Edit** icon in the **Position Details** section (if applicable).

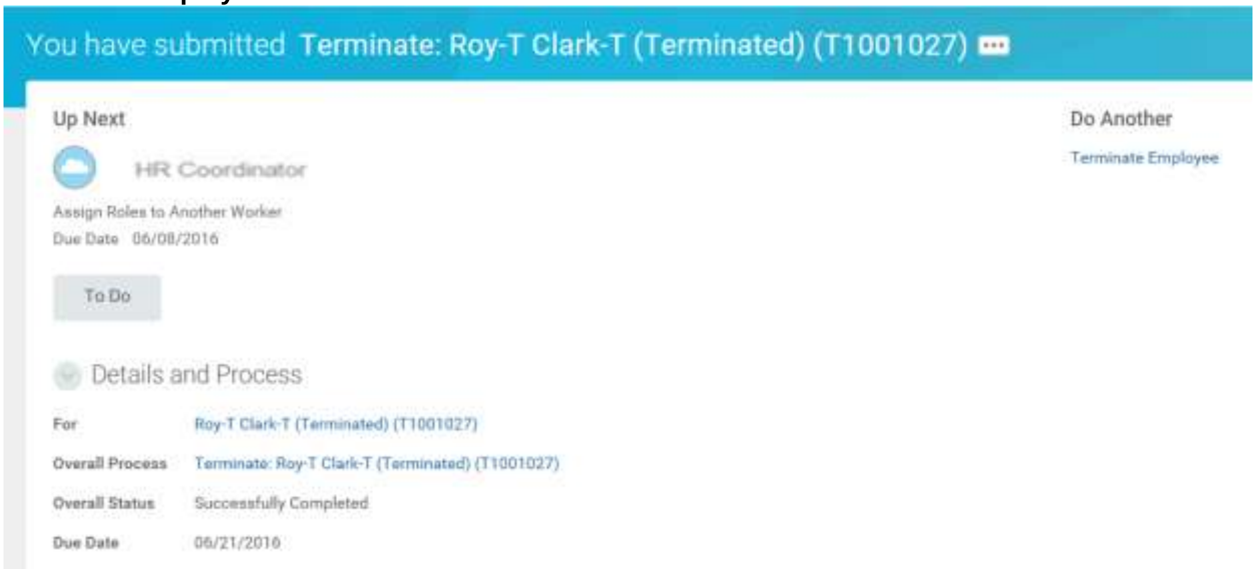
If	Then
If you want to abolish the position after it is vacated...	Click the **Close Position** checkbox. ***NOTE:*** *This box should only be selected in rare cases if the position is going to be closed permanently.*
If you want to make the position available for overlap...	Click the **Is This Position Available for Overlap** checkbox. ***NOTE:*** *This checkbox is only active when the* ***Termination Date*** *entered is in the future.*

9. If applicable, attach the appropriate documents in the Attachments section.

10. Click the Submit button. This will submit the termination and route to the next step in workflow.

Information: The termination will be routed for approval. Additional tasks (e.g. To Dos are completed and will appear in the HR Coordinator's Inbox. Refer to the Process Overview for details.

Terminate Employee



11. Review the next step in the process and then do one of the following:
12. Click the button in the **Up Next** section if there is another task to complete in the process, OR
13. Click the **Done** button to finish.

14. The System Task is complete.

Procedure: Assign Roles to Worker

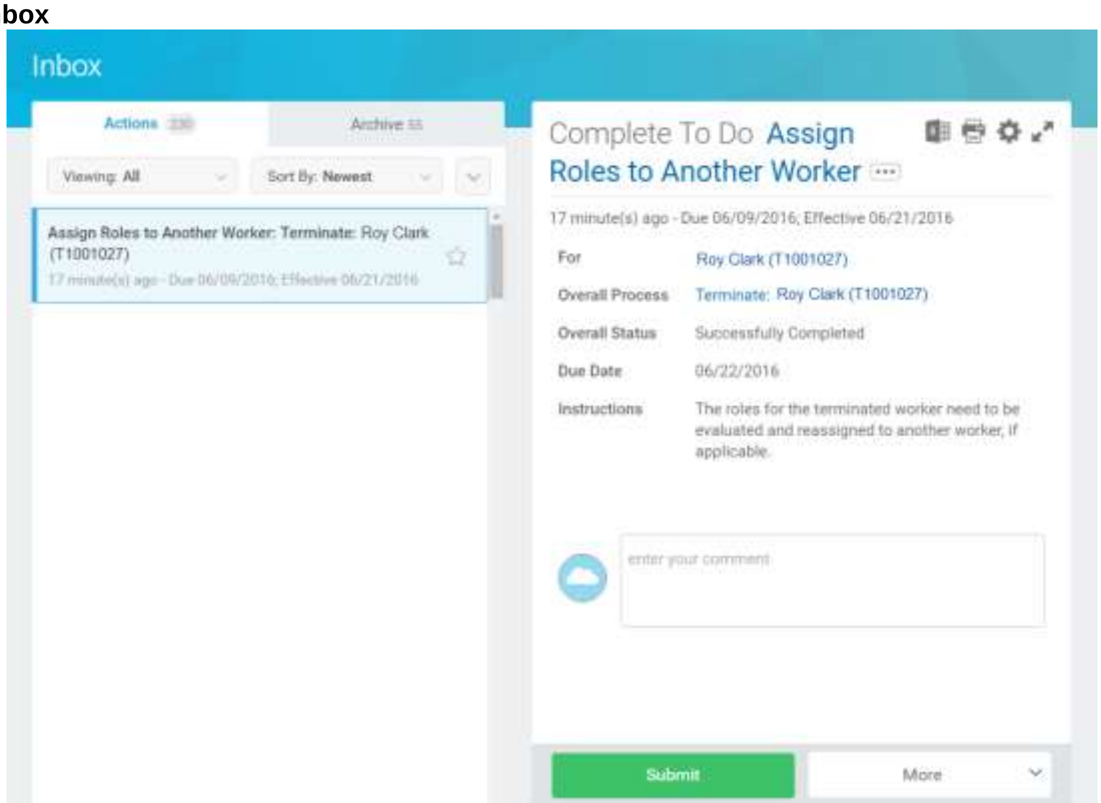
Use this procedure to review and mark the “Assign Roles to Another Worker” task complete.

The Assign Roles to Worker task is a “To Do” that displays when a worker leaves a position. When a worker leaves a job, you may need to assign that worker’s roles to another worker. The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

Procedure:

1. Click the **My Account** in the top right corner of the page.
2. Then, click the **Inbox** link.

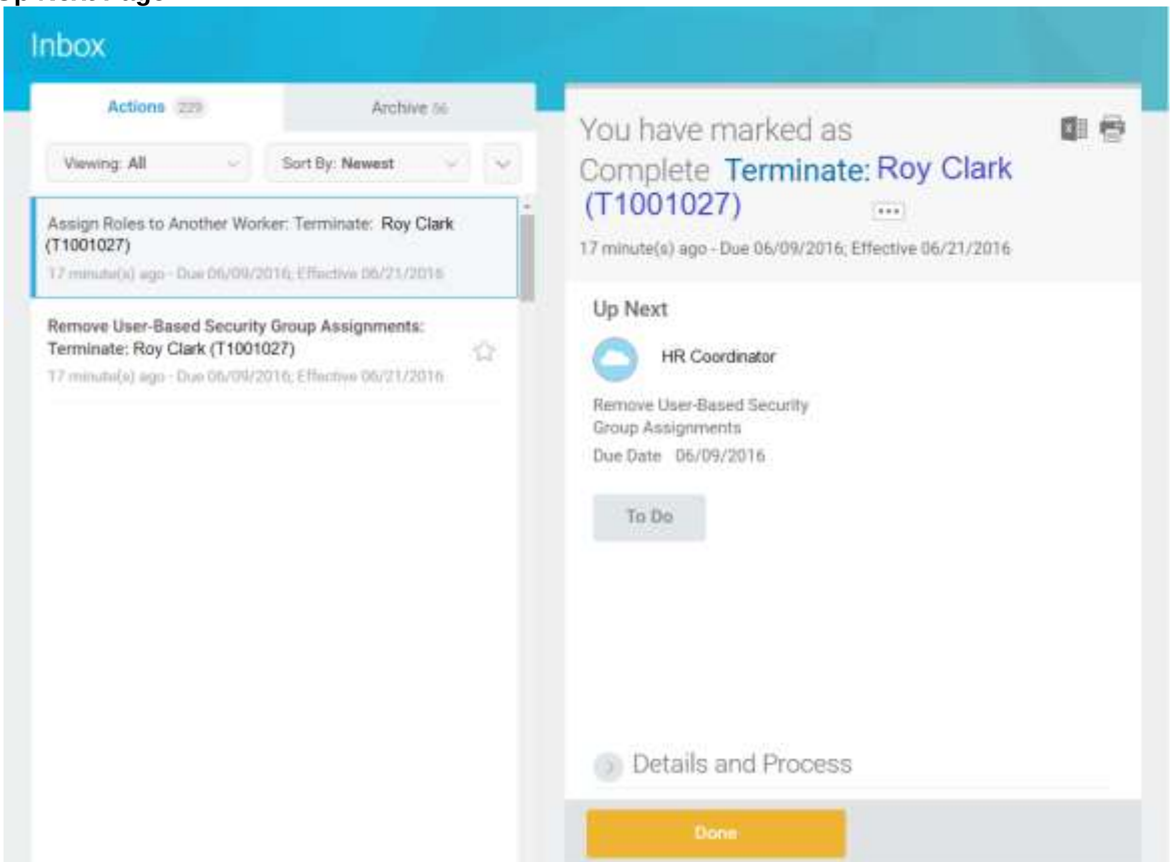
Inbox



3. On the Actions tab, click the “Assign Roles to Worker” task for the terminated employee.
4. Read the instructions and then click the **Submit** 
 button.

Information: The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

Up Next Page



5. The “Assign Roles to Another Worker“ task is marked complete. Review the next step in the process and then do one of the following:
   a. Click the button in the **Up Next** section if there is another task to complete in the process, **OR**
   b. Click the **Done** button to finish.

6. The System Task is complete.

Procedure: Remove User-Based Security Group Assignments

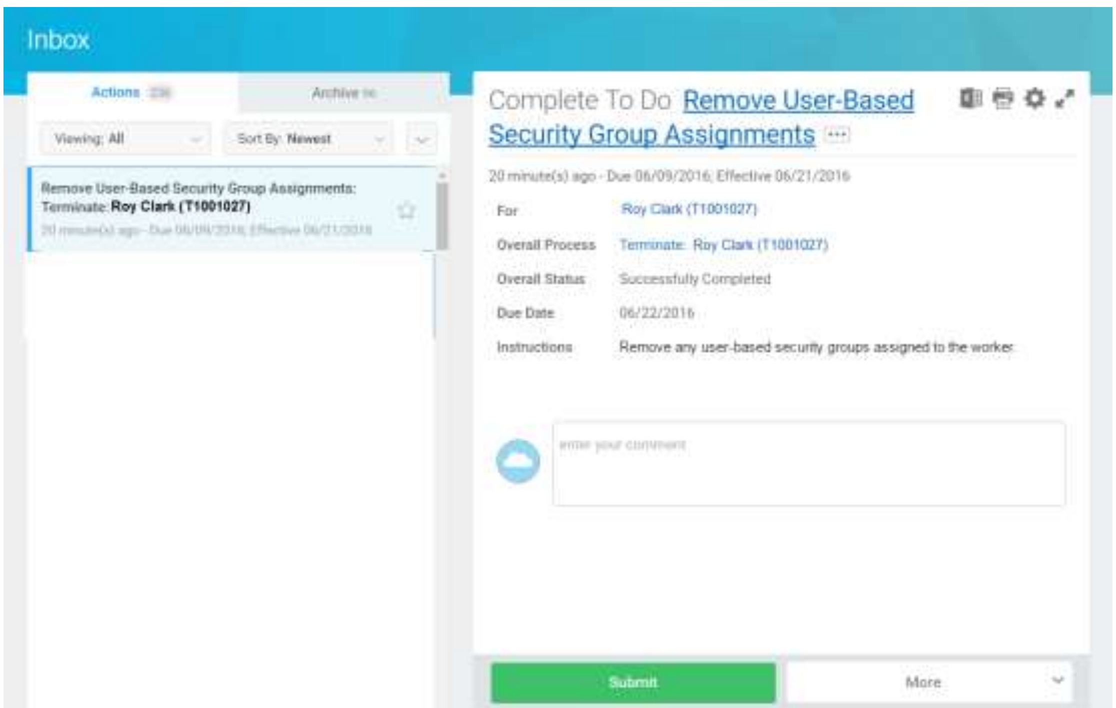
Use this procedure to review and mark the "Remove User Based Security Group Assignments" task complete.

A reminder to evaluate the terminated employee's user-based role assignments may also appear in the HR Coordinator's inbox. The user-based role assignments (such as an administrator) for the terminated worker need to be evaluated, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

Procedure:

1. Click the **My Account** in the top right corner of the page.
2. Then, click the **Inbox** link.

Inbox

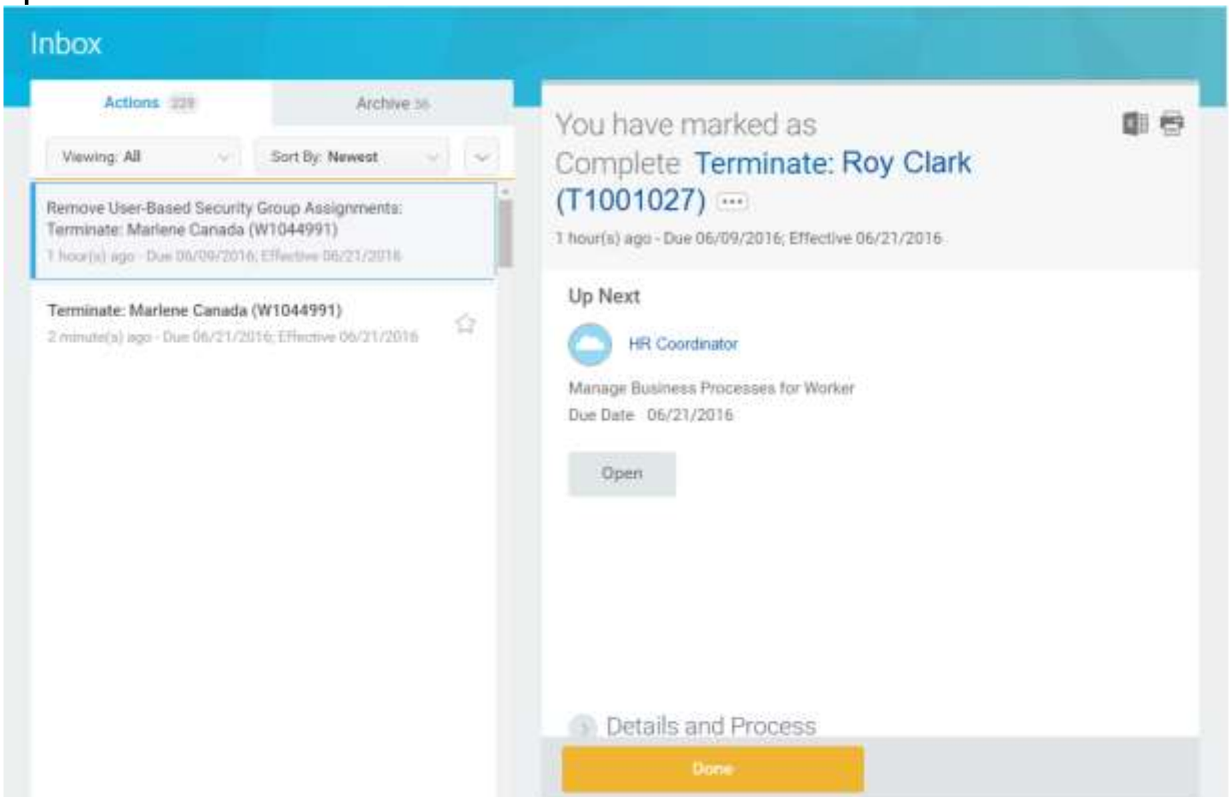


3. On the Actions tab, click the "Remove User Based Security Assignments" task. **Note**: The employee's name is in the task name.
4. Read the instructions and then click the **Submit** 

button.

Information: The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

Up Next



5. The task is marked complete. Review the next step in the process and then do one of the following:
   7. Click the button in the **Up Next** section if there is another task to complete in the process, **OR**
   8. Click the **Done** button to finish.

6. The System Task is complete.

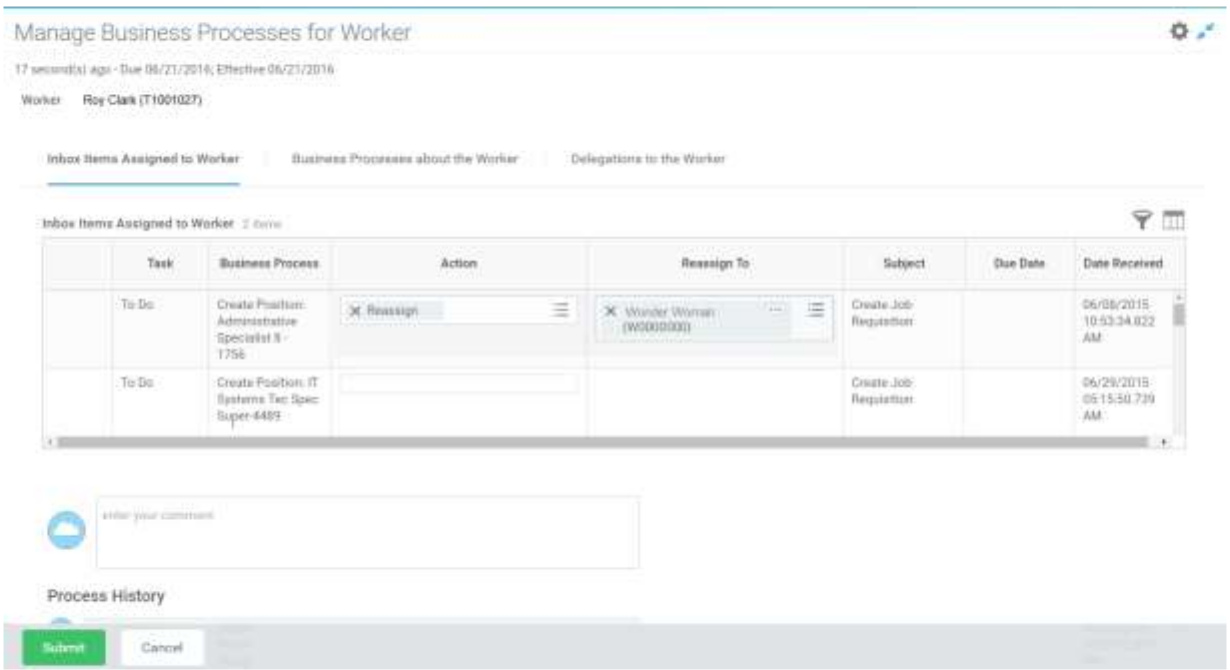
Procedure: Manage Business Processes for Worker

Use this procedure to cancel or reassign pending tasks for a worker that is leaving. This task appears in the HR Coordinators Inbox when an employee leaves a position (e.g., after a termination is approved in the system) and has tasks awaiting action.

Procedure:

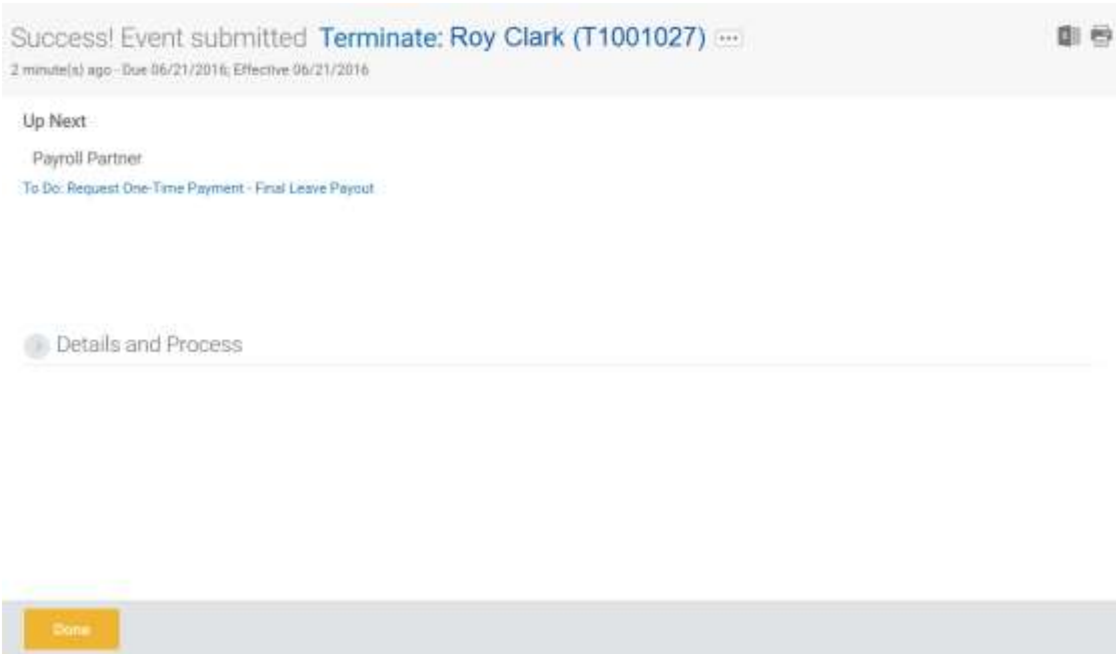
1. Click the **My Account** in the top right corner of the page.
2. Then, click the **Inbox** link.
3. On the Actions tab, click the “Terminate” task to the employee. Note: the employee’s name is in the task name.
4. To cancel or reassign tasks, click on the "Inbox Items Assigned to Worker” tab.

Manage Business Processes for Worker



5. In the **Action** column, use the prompt to select the appropriate action (i.e., Cancel or Reassign)
6. If you are reassigning the task, use the prompt to select the reassigned worker.
7. Click the **Submit**  button.

Up Next Page



8. The task is marked complete. Review the next step in the process and then do one of the following:
    a. Click the button in the **Up Next** section if there is another task to complete in the process, OR
    b. Click the **Done** button to finish.

9. The System Task is complete.